



# House of Representatives

General Assembly

**File No. 213**

*February Session, 2014*

House Bill No. 5380

*House of Representatives, March 31, 2014*

The Committee on Program Review and Investigations reported through REP. MUSHINSKY of the 85th Dist., Chairperson of the Committee on the part of the House, that the bill ought to pass.

***AN ACT IMPLEMENTING THE RECOMMENDATIONS OF THE  
PROGRAM REVIEW AND INVESTIGATIONS COMMITTEE  
CONCERNING A REPORT ON FINANCIAL AID AWARDS AND  
TRACKING TRANSFER CREDITS BY THE UNIVERSITY OF  
CONNECTICUT.***

Be it enacted by the Senate and House of Representatives in General Assembly convened:

1 Section 1. Section 10a-57 of the general statutes is repealed and the  
2 following is substituted in lieu thereof (*Effective July 1, 2014*):

3 (a) The executive director of the Office of Higher Education shall  
4 report on or before March 1, 2013, and annually thereafter, in  
5 accordance with the provisions of section 11-4a, to the joint standing  
6 committees of the General Assembly having cognizance of matters  
7 relating to higher education and appropriations and the budgets of  
8 state agencies on state, regional and national trends regarding  
9 Connecticut higher education, including, but not limited to,  
10 expenditures, funding, enrollment, faculty and staff positions, cost  
11 sharing and student financial aid. The Office of Higher Education shall

12 collect such data and information as directed in this section and as it  
13 deems necessary for the development of such annual report.

14 (b) On or before January 1, 2015, and annually thereafter, The  
15 University of Connecticut shall develop and provide to the Office of  
16 Higher Education for inclusion in the higher education trends report  
17 made in accordance with subsection (a) of this section a report  
18 indicating the manner in which financial aid was awarded in the prior  
19 academic year to its in-state students and, separately, to its out-of-state  
20 students, including, but not limited to, the following:

21 (1) The number and percentage of all undergraduate students and,  
22 separately, first-time, full-time freshmen, who received need-based  
23 institutional aid;

24 (2) The number and percentage of all undergraduate students and,  
25 separately, first-time, full-time freshmen, who received merit-based  
26 institutional aid, listed separately for each type of merit-based  
27 institutional aid, the percentage of such students and freshmen who  
28 had no financial need, as determined by expected family contribution  
29 for educational costs as computed from a student's Free Application  
30 for Federal Student Aid, and the percentage of such students and  
31 freshmen whose aid exceeded financial need, excluding those students  
32 with no financial need;

33 (3) A list of the typical financial aid packages awarded, which shall  
34 be grouped by quintiles of expected family contribution for  
35 educational costs as computed from the student's Free Application for  
36 Federal Student Aid, categorized by aid type; and

37 (4) The amount of financial aid received by all undergraduate  
38 students and, separately, first-time, full-time freshmen, categorized by  
39 aid type, including each aid type's share of total dollars awarded.

40 For purposes of this subsection, (A) "quintile" means the division of a  
41 range of data into five equal parts, each such part being twenty per  
42 cent of the range; and (B) "merit-based institutional aid" includes any

43 financial aid awarded primarily or solely based on a student's  
44 academic or other talent and conferred by the university's financial aid  
45 office, academic and athletic departments or foundation.

46 (c) On or before January 1, 2015, and annually thereafter, The  
47 University of Connecticut shall develop and provide to the Office of  
48 Higher Education for inclusion in the higher education trends report  
49 made in accordance with subsection (a) of this section a report  
50 regarding the university's analysis of course transferability for  
51 students enrolling at the university after first completing coursework  
52 at another institution of higher education. Such report shall include: (1)  
53 The number of transfer students who applied, were accepted and  
54 enrolled at the university; (2) the number of transfer courses and  
55 credits applied for by enrolling students; (3) the number and  
56 percentage of courses and credits accepted by the university for credit  
57 toward its general education requirements; and (4) the number and  
58 percentage of courses and credits within a student's major that are  
59 accepted as applicable toward the corresponding major requirements  
60 of the university. The university shall separate the data in the report  
61 according to each public institution of higher education in this state  
62 from which the transfer student is transferring and, in the aggregate, to  
63 students transferring from independent institutions of higher  
64 education and out-of-state public institutions of higher education.

This act shall take effect as follows and shall amend the following sections:

Section 1	July 1, 2014	10a-57
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**PRI**      *Joint Favorable*

The following Fiscal Impact Statement and Bill Analysis are prepared for the benefit of the members of the General Assembly, solely for purposes of information, summarization and explanation and do not represent the intent of the General Assembly or either chamber thereof for any purpose. In general, fiscal impacts are based upon a variety of informational sources, including the analyst's professional knowledge. Whenever applicable, agency data is consulted as part of the analysis, however final products do not necessarily reflect an assessment from any specific department.

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***OFA Fiscal Note***

***State Impact:*** None

***Municipal Impact:*** None

***Explanation***

The bill results in no fiscal impact as the University of Connecticut has the data and sufficient expertise to provide the Office of Higher Education with all the necessary information required in the bill.

***The Out Years***

***State Impact:*** None

***Municipal Impact:*** None

**OLR Bill Analysis****HB 5380*****AN ACT IMPLEMENTING THE RECOMMENDATIONS OF THE PROGRAM REVIEW AND INVESTIGATIONS COMMITTEE CONCERNING A REPORT ON FINANCIAL AID AWARDS AND TRACKING TRANSFER CREDITS BY THE UNIVERSITY OF CONNECTICUT.*****SUMMARY:**

This bill requires UConn, beginning January 1, 2015, to compile separate, annual reports on (1) awarding student financial aid and (2) course transferability, for the Office of Higher Education (OHE) to include in its higher education trends report.

By law, OHE annually delivers a trends report to the Higher Education and Appropriation committees on state, regional, and national trends in higher education expenditures; funding; enrollment; faculty and staff positions; cost sharing; and financial aid.

EFFECTIVE DATE: July 1, 2014

**STUDENT FINANCIAL AID REPORT**

The bill requires UConn's financial aid report to address financial aid awards given to both in- and out-of-state students, separately, each academic year. It must include the:

1. numbers and percentages of all undergraduate and of first-time, full-time students who received (a) need-based institutional aid and (b) merit-based institutional aid;
2. typical aid packages awarded, categorized by type, with students grouped into five equal aid ranges according to their expected family contribution (EFC) (see BACKGROUND); and

3. amounts of financial aid received by all undergraduates and by first-time, full-time freshmen categorized by aid type, along with the share of total dollars awarded for each aid type.

***Merit-based Institutional Aid***

The bill defines “merit-based institutional aid” to include awards primarily or solely based on academic achievement or other talent, conferred by UConn’s financial aid office, academic and athletic departments, or foundation.

It requires UConn to list merit-based aid types separately and further separate such aid by the percentage of students and freshmen who:

1. have no financial need, as determined by EFC and
2. have aid exceeding financial need, excluding those students with no financial need.

**COURSE TRANSFERABILITY REPORT**

The bill also requires UConn to separately report on course transferability for students who first completed courses at another college or university. The report must include the:

1. number of transfer students who applied, were accepted, and enrolled at UConn,
2. number of transfer courses and credits applied for by such students, and
3. number and percentage of courses and credits accepted by UConn towards general education requirements and corresponding major requirements.

UConn must report the data for each Connecticut public institution from which students are transferring and, in the aggregate, for students transferring from Connecticut private and out-of-state public colleges and universities.

**BACKGROUND*****EFC***

A student's EFC is the amount his or her family is expected to contribute toward educational costs. Each student seeking financial aid must submit a Free Application for Federal Student Aid (FAFSA). The federal government uses FAFSA to calculate a student's EFC.

**COMMITTEE ACTION**

Program Review and Investigations Committee

Joint Favorable

Yea    11    Nay    0    (03/13/2014)